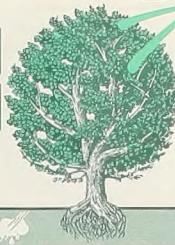




OPERATION GREEN GOLD FORUM

FORUM

# Forestry Forum



PUBLISHED BY THE CANADIAN FORESTRY SERVICE FOR THE CANADIAN COUNCIL OF FOREST MINISTERS

WINTER 1987

## Green Gold/L'or vert

### National Forest Awareness Campaign Launched!

An unprecedented cooperative effort among federal, provincial and territorial governments has resulted in the Canadian Council of Forest Ministers (CCFM) launching a national information campaign telling Canadians about their forest sector.

The \$4 million campaign is being co-ordinated by the Canadian Forest Communications Committee (CFCC), a team of federal and provincial communications specialists, in consultation with a nationwide consortium of advertising, promotion and public relations firms.

Designed to show Canadians how much the forest sector contributes to Canada's economic health and social well-being, the campaign is aimed at raising the forest sector's profile, developing an informed group of people willing to participate in the campaign, and promoting pride of ownership and a sense of responsibility for the forests.

The central theme of the campaign is trade. With more than 70 per cent of all Canadian forest products going for export, trade was chosen to create a common link for all regions of the country, and to give the sector an international scope.

#### FOUR-PRONGED STRATEGY

The campaign will portray the forest sector as what it really is, a vigorous, competitive sector of companies, people and governments working together to tackle present and future challenges.

Campaign messages will stress the importance of the forest sector for Canada, the value of responsible forest management and renewal, and the need for support from all Canadians to sustain the forests. They will be delivered through a four-pronged approach consisting of advertising, public relations, promotion and information materials.

Advertising will be aimed at all Canadians but will especially focus on urban adults, 18 to 44, the people identified in a recent Gallup Poll as knowing least about forestry. Its message, emphasizing Canada's position as a world leader in forest products and Canada's forest industry as

OUR FORESTS, AT THE EDGE OF A NEW WORLD.

Who on earth creates the world's greatest paper?

Our forests. Our richest resource. Our biggest business.

1. We do it. 2. We do it. 3. We do it. 4. We do it. 5. We do it. 6. We do it. 7. We do it. 8. We do it. 9. We do it. 10. We do it. 11. We do it. 12. We do it. 13. We do it. 14. We do it. 15. We do it. 16. We do it. 17. We do it. 18. We do it. 19. We do it. 20. We do it. 21. We do it. 22. We do it. 23. We do it. 24. We do it. 25. We do it. 26. We do it. 27. We do it. 28. We do it. 29. We do it. 30. We do it. 31. We do it. 32. We do it. 33. We do it. 34. We do it. 35. We do it. 36. We do it. 37. We do it. 38. We do it. 39. We do it. 40. We do it. 41. We do it. 42. We do it. 43. We do it. 44. We do it. 45. We do it. 46. We do it. 47. We do it. 48. We do it. 49. We do it. 50. We do it. 51. We do it. 52. We do it. 53. We do it. 54. We do it. 55. We do it. 56. We do it. 57. We do it. 58. We do it. 59. We do it. 60. We do it. 61. We do it. 62. We do it. 63. We do it. 64. We do it. 65. We do it. 66. We do it. 67. We do it. 68. We do it. 69. We do it. 70. We do it. 71. We do it. 72. We do it. 73. We do it. 74. We do it. 75. We do it. 76. We do it. 77. We do it. 78. We do it. 79. We do it. 80. We do it. 81. We do it. 82. We do it. 83. We do it. 84. We do it. 85. We do it. 86. We do it. 87. We do it. 88. We do it. 89. We do it. 90. We do it. 91. We do it. 92. We do it. 93. We do it. 94. We do it. 95. We do it. 96. We do it. 97. We do it. 98. We do it. 99. We do it. 100. We do it.

Our forests. Our richest resource. Our biggest business.

world-class and market driven, is intended to stimulate interest and pride in the industry.

Phase One of the campaign, from January to April 1987, will concentrate on what has to be done to secure the forest sector's future. It will be national in scope and designed to build profile and credibility for the forest sector.

This phase will be high-

lighted by a series of 30-second television commercials and two-page magazine ads in which four internationally renowned individuals will tell Canadians how Canadian forest products are important to their countries. They will stress Canada's need for aggressive marketing, competitive technology and increased research to stay ahead of the competition.

Phase Two, from September to November 1987, will be more regional in focus. A provincial/territorial campaign with television and newspaper advertisements will address specific issues and respond to regional forestry concerns. This phase will be directed toward a more informed public and deal with solutions to problems and opportunities identified in Phase One.

## Inside

FOREST DEVELOPMENT  
ENGINE OF REGIONAL GROWTH

LET'S SEE OURSELVES  
AS OTHERS SEE US

WILL CANADA STAY  
AHEAD OF THE  
COMPETITION?

GO FOR THE GOLD:  
GREEN GOLD THAT IS!

The CCFM wishes to thank all those who contributed to this publication.

INFORMATION: Canadian Forestry Service, Ottawa-Hull, K1A 0C5

The public phase of the campaign will focus on the economic value and world stature of Canada's forest industry and products and is designed to enlist the support of opinion leaders from business, universities, politics, the media and the forest community itself.

Promotional efforts designed to increase the effectiveness of the advertising and public relations components are now focused on the official campaign kick-off. It will be launched with a gala sound and light presentation on January 26 in Montreal that coincides with the Annual Convention of the Canadian Pulp and Paper Association.

## A Symbol to Grow On

The symbol of the Canadian Council of Forest Ministers (CCFM) is drawn from the cross section of a mature tree and symbolizes growth and cooperation.

It has two components: the maple leaf and the evergreen which represent the two major groups of trees that make up the Canadian forest mosaic. The maple leaf is also emblematic of Canada.

The inner circle represents the federal minister responsible for forestry. The 12 growth lines of the tree represent Canada's provinces and territories and their respective ministers responsible for forest resources.

The symbol as a whole can be seen as a target, representing the challenges and

opportunities facing the Council: employment, trade, wood supply, forest environment and others. The circular form of the symbol, suggesting the globe, puts the Canadian forest sector into an international perspective.

#### THE COLOURS

In the full colour version of the logo, the area behind the maple leaf is blue and symbolizes water and the sky. Blue is also symbolic of the oceans to the East, West and North of this country, and of the efforts of the CCFM on behalf of all Canadians from coast to coast. The evergreen is symbolic of a healthy forest and a growing forest sector. Finally, the Canadian identity is reflected in the red appearing in the maple leaf, borrowed from the Canadian flag.



The concentric circles add life and movement to the symbol. They represent the active cooperation of all forest partners working toward achieving their goals

and objectives. The circles also combine to create a radiant effect within the symbol, suggesting the sun, one of the main sources of growth.

# Forest Development: Engine of Regional Growth

Last year the people of the Big "C" Indian Reserve in north-western Saskatchewan completed their first silvicultural operation on their own reserve: a thinning of 45 hectares of young jack pine.

In response to an increased demand for seedlings from local woodlot owners, a co-operative in the Bas-Laurent region of Quebec built a nursery that now supplies 400,000 seedlings a year to woodlot owners. The nursery employs 24 full-time and part-time workers, 21 of whom are women.

Western Architrave Ltd. of Edmonton developed a new laminated beam that uses Canadian instead of imported lumber and costs less to produce. Sales of the new beam have led to the creation of several new jobs.

What do these three success stories have in common? Two things: they are all a result of a new generation of federal-provincial forest development agreements and they show how forest development means regional development and jobs for Canadians.

## FORESTRY: CANADA'S REGIONAL INDUSTRY

The forest sector plays a major role in the economy of every region of Canada. It's a \$33 billion a year industry, with exports of \$16 billion that, in 1984, accounted for over 80 per cent of Canada's positive balance of payments. Directly and indirectly, forestry supports one Canadian job in 15, a total of 750,000 jobs.

Although of major national economic importance, the forest sector is regional by its very nature. There are more than 300 single industry communities in Canada that derive their livelihood from the industry. In many other communities, the forest is a mainstay of the tourism industry. For the over 400 thousand woodlot owners in rural Canada, their woodlot is an important source of income and employment, as well as a supply of wood for industry.

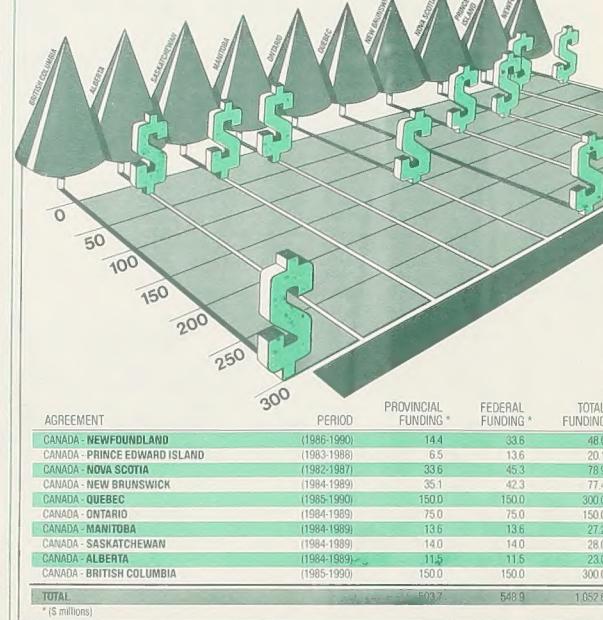
But the economic benefits of the forest industry don't stop at the edge of the forest. For example, the industry directly provides: 35 per cent of all jobs in Dalhousie, New Brunswick; 33 per cent of all jobs in Windsor, Quebec; 26 per cent of all jobs in Thunder Bay, Ontario; and 42 per cent of all jobs in Port Alberni, British Columbia.

It also employs many Canadians living in some of our largest cities. For example, the forest industry directly employs 18,000 people living in the heart of Metro Toronto, or 1.2 per cent of employment in that city.

For every job directly tied to forestry, two additional jobs are created in fields like equipment manufacturing, finance and printing, and in the energy, chemical, and transportation sectors. For example, the forest industry spends \$3.5 billion a year on equipment and machinery alone. Many of these industries form the economic base of our cities.

The agreements also help to promote the proper management of the forest resources on Canada's native lands. This provides immediate jobs for Canada's native people and lays the groundwork for future economic development based on their own forest resources. For example, in British Columbia, the first forest development plans are now in progress for over 40 per cent of the forest land on native reserves in that province. In Alberta, close to 1,000 hectares of Indian forest lands have been treated to improve growth while in Saskatchewan, one-quarter of the employment generated as a result of the agreement is expected to be filled by native people.

## FEDERAL-PROVINCIAL FOREST RESOURCE DEVELOPMENT AGREEMENTS



### FEDERAL-PROVINCIAL FOREST RESOURCE DEVELOPMENT AGREEMENTS

The Government of Canada understands how important the forest sector is to regional development in that it builds on human and natural resource strengths and on the initiative of those who live and work in different regions of the country.

To encourage regional economic development, the federal government has entered into a new generation of forest resource development agreements with each province. These five year agreements will result in an additional investment by the federal and provincial governments of over \$1 billion in Canada's forest resources.

The agreements have resulted in the development and expansion of private businesses creating new jobs for Canadians. In Quebec, 18 private nurseries have been established to meet the increased demand for seedlings to be planted, while in Nova Scotia, 175 silviculture contractors have established small businesses employing 1400 people. On Prince Edward Island, 30 silviculture contractors have established businesses employing 130 people and two new businesses have developed to supply wood chips for energy which displaces expensive oil imports.

Directly and indirectly, the agreements are expected to generate in excess of 100,000 jobs across the country, primarily in the more rural areas of Canada.

Equally important, the agreements work on strengthening Canada's forest resources. To date under the current forest resource development agreements:

- 225,000 hectares of forest land have been regenerated;
- more than 525 million trees have been planted;

These agreements are complemented by a \$23.7-million woodlot-development program under the federal Eastern Quebec Plan.

Job creation programs also contribute money for forest development — about \$94 million in 1985-86.

These employment-development programs in the forest sector have created direct employment for over 50,000 Canadians; 14 million trees have been planted, and an additional 70,000 hectares have been treated since 1982.

All of this helps to secure an adequate wood supply for one of Canada's leading industries and important jobs and exports for Canada.

Forest development offers an excellent basis for regional development. It creates immediate economic and employment opportunities in the regions of Canada, while building a solid natural resource base on which to secure long-term, regional economic growth.

National leadership and coordination, and continued cooperation with the provinces, will ensure that first-rate forest development accompanies regional development, generating important economic, social and environmental benefits for all Canadians.

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## DID YOU KNOW?

- The forest industry is the sole life support system of more than 300 one-industry communities in Canada that derive their livelihood from forest management, logging and related timber-processing industries.
- Canada is the world's largest producer of chemical paper grade market pulp, accounting for 27 per cent of world capacity in 1985. Approximately 90 per cent of Canada's pulp is exported.
- British Columbia supplies about 50 per cent of the country's total market pulp. New Brunswick, Ontario and Quebec account for 12, 13 and 14 per cent respectively.
- Kraft paper is made mostly from wood pulp produced by the sulphate pulping process. They are comparatively coarse and are used where strength is required, in packing and wrapping as grocer's bags, envelopes and butcher paper.
- Boxboard describes paper-board used to make boxes. It can be plain, lined or clay coated and made from wood pulp, paper stocks or any combination of these.
- The spruce budworm causes a loss of 45,000 cubic metres of wood each year in Canada. This represents a volume equivalent to the amount of softwood lumber used in Canadian residential housing construction in the last two years.

## Let's See Ourselves as Others See Us

CAI  
EP 20  
FSC



«You cannot afford to let down for one minute.»

— Sir John Eagan

What do luxury cars and best-sellers have in common with Canada's forestry industry? Surprisingly, quite a lot.

Listen to what Sir John Eagan, Chairman of Britain's Jaguar Motors has to say: "We work very hard to protect Jaguar's technological edge in world markets. You in Canada face a similar challenge — to maintain your competitive edge in forest products." And, he cautions, "you cannot afford to let down for one minute."



«Yours is the best in the world.»

— Pedro Ramirez Vasquez

It's been a tough market to crack. It took the right products, adapted to the Japanese market; good staff, trained and placed in Japan; and even mills built specifically to produce lumber for the Japanese market. But it's been worth it — a billion dollars worth.

From Japan, we follow the trail of Canadian forest products to Mexico, where Pedro Ramirez Vasquez, renowned Mexican architect, takes us on a tour through the cathedral of our Lady of Guadalupe. "Canadian technology added a beautiful note to our cathedral," he says. "We continue to use traditional building materials, and wood is one of them. Right now, yours is the best in the world."

This segment will focus on the role of research and innovation in opening up new markets and retaining established ones — the kind of innovation that can sell waferboard in Korea, fine paper in Europe, and even put Canadian cedar in a magnificent Mexican cathedral. Research makes our forest products world-class, and Pedro Vasquez reminds us to "keep the them that way."

Stay tuned through the coming months for this innovative approach to promoting the Canadian forest sector, and don't run to the kitchen during the next commercial. It may be telling the Canadians about YOUR sector.



«Your lumber is highly esteemed for house building.»

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The campaign is the result of unprecedented cooperation among federal, provincial and territorial governments. It's the brainchild of the Canadian Council of Forest Ministers (CCFM), composed of the federal Minister of State for Forestry and Mines and the 12 provincial and territorial ministers of forestry.

For maximum impact the campaign needs the participation of everyone involved in the forest sector. It won't take much time, but if every one of Canada's 300,000 forest sector employees gets behind the campaign, it can do great things for the forest sector and for Canada.

So that everyone knows the details of this campaign in advance, free copies of this issue of *Forestry Forum*, including the information insert, are being distributed to all people who work in the forest sector.

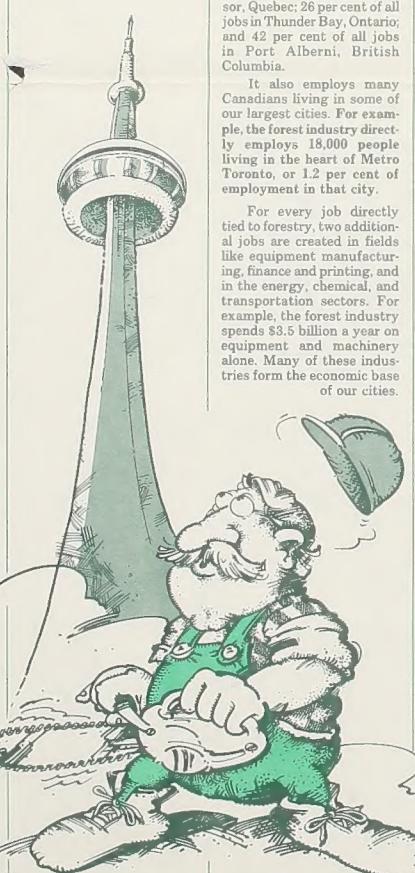
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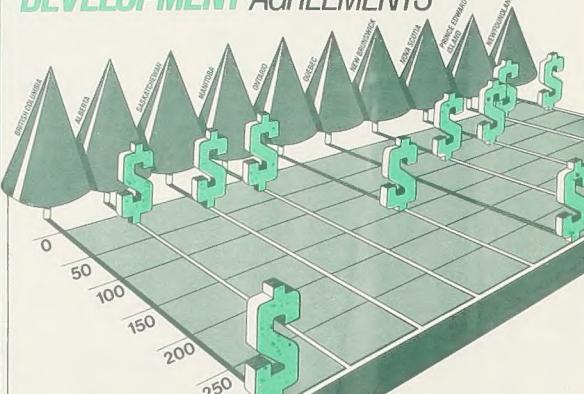
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AGREEMENT	PERIOD	PROVINCIAL FUNDING *	FEDERAL FUNDING *	TOTAL FUNDING *
CANADA - NEWFOUNDLAND	(1986-1990)	14.4	33.6	48.0
CANADA - PRINCE EDWARD ISLAND	(1983-1988)	6.5	13.6	20.1
CANADA - NOVA SCOTIA	(1982-1987)	33.6	45.3	78.9
CANADA - NEW BRUNSWICK	(1984-1989)	35.1	42.3	77.4
CANADA - QUEBEC	(1985-1990)	150.0	150.0	300.0
CANADA - ONTARIO	(1984-1989)	75.0	75.0	150.0
CANADA - MANITOBA	(1984-1989)	13.6	13.6	27.2
CANADA - SASKATCHEWAN	(1984-1989)	14.0	14.0	28.0
CANADA - ALBERTA	(1984-1989)	11.5	11.5	23.0
CANADA - BRITISH COLUMBIA	(1985-1990)	150.0	150.0	300.0
<b>TOTAL</b>		<b>503.7</b>	<b>545.9</b>	<b>1,059.6</b>

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■ 160,000 hectares have been thinned, weeded or fertilized to improve growth.

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■

Eucalyptus pulp is making a big splash in the pulp market. For several months in 1986 eucalyptus pulp sold for a higher price than softwood pulp. Total Brazilian exports of bleached hardwood kraft peaked at 927,000 tonnes in 1983. Acceptance of short-fiber pulp like eucalyptus has persuaded some Canadian softwood mills to produce aspen pulp, allowing them to use a readily-available resource and increase production.

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*You cannot afford to let down for one minute.*

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## Become a Forest Partner

Get ready to talk forestry with your friends, neighbours and co-workers. When the National Forestry Awareness Campaign goes into high gear later this month, you'll be the expert they turn to for information on Canada's number-one industry.

The two-year, \$4-million campaign, which begins with a series of 30-second television commercials and two-page magazine advertisements, will keep the national spotlight focused on the Canadian forest sector during 1987.

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New markets for Canadian forest products are the subject of the third commercial, with spokesman Hajime Tsuhoi, president of Mitsui Homes in Tokyo. Canada sells over one billion dollars a year in forest products to Europe, and even put Canadian cedar in a magnificent Mexican cathedral. Research makes our forest products world-class, and Pedro Vasquez reminds us to "keep them that way."

Stay tuned through the coming months for this innovative approach to promoting the Canadian forest sector, and don't run to the kitchen during the next commercial. It may be telling the Canadian story about YOUR sector.

Canadian forest products are international best-sellers as is the novel *The Thornbirds*, by Australian author Colleen McCullough. The book was recently produced as a television mini-series. Ms. McCullough will be on Canadian television herself this spring, against the backdrop of an Australian sheep ranch, reminding Canadians that her book was printed on Canadian paper. "Canada's best-seller and mine have a lot in common," she says. "Just make sure you stay ahead of the competition."

*Your lumber is highly esteemed for house building.*

— Hajime Tsuhoi



*Just make sure you stay ahead...*

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## Let's See Ourselves as Others See Us

CAL  
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FSG



*You cannot afford to let down for one minute.*

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*Yours is the best in the world.*

— Pedro Ramirez Vasquez

The McCullough commercial will focus on pulp and paper products, stressing Canada's diminishing share of world markets in the face of international competition and the need to stay ahead through improved technology, better products and competitive prices.

This segment will focus on the role of research and innovation in opening up new markets and retaining established ones — the kind of innovation that can sell waferboard in Korea, fine paper in Europe, and even put Canadian cedar in a magnificent Mexican cathedral. Research makes our forest products world-class, and Pedro Vasquez reminds us to "keep them that way."

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*Just make sure you stay ahead...*

— Colleen McCullough

# Will Canada Stay Ahead of the Competition?

Canada's position as world leader in forest products is under attack.

Once undisputed, our position of leadership in the international trade of forest products is being challenged by changes in the world economy, new competitors, technologies and products. Developments such as a strengthened U.S. industry, new producers from South America, New Zealand and other regions, and Scandinavian competition in Europe have combined to raise concerns about Canada's future place in world forest products trade.

Forest products are Canada's largest single source of export earnings. Canada is the world's largest exporter of wood pulp, softwood lumber and newsprint. But 90 per cent of our forest product exports are concentrated in three markets: the United States, the European Economic Community (EEC) and Japan.



Canada has benefitted from relatively free access to major markets to compete effectively. However, there are concerns about growing protectionist pressures in our traditional markets. The recent agreement negotiated

between the Government of Canada and the United States Department of Commerce has resulted in the imposition of a 15 per cent tax on the export of Canadian softwood lumber to U.S. markets. This is an example of the types of trade difficulties facing our industry at this time. An additional concern is relatively high tariffs on

higher value-added products. In addition, there is the disturbing prospect that non-tariff barriers will continue to offset the significant tariff reductions negotiated several years ago under the General Agreement on Tariffs and Trade (GATT).

In Europe, the Scandinavian countries offer the strongest competition. Their geographic proximity, duty-free access to the EEC market and exchange rate advantages have made it particularly hard for Canada to compete in this region.

Japan is Canada's largest overseas market for softwood lumber, taking six per cent of our exports of this commodity. But the Japanese also import large volumes of logs from the United States and countries in the southern hemisphere which compete directly with our market in the U.S. market.

## PRODUCT MIX

Product mix is another area of concern. Our export trade is concentrated in commodity products with less added value, such as lumber, wood pulp and newsprint. Industry forecasts suggest that demand will increase at a faster rate for products with higher added value. This in turn suggests that we must continue to diversify our product mix in order to stay ahead of the competition in a changing market.

## WORLD ECONOMIC CONDITIONS

Canada relies on stable economic conditions in the world economy. Factors like fluctuating exchange rates or high interest rates create uncertainty for traders and restrain trade.

On the positive side, Canada has abundant and relatively inexpensive energy resources. We have a well-developed transportation system and other high quality industrial plants. We have abundant water and extensive areas of commercial forest land. Finally, we have a well-trained labour force and extensive experience in the international marketing of forest products.

## WOOD SUPPLY

There has been much discussion about the health of Canada's wood supply, but it seems likely that Canada's international competitiveness will not be significantly impaired by wood shortages, at least in this century.

Canada has extensive timber resources, and although much of the timber is in remote areas, Canadians have a lot of experience logging remote timber stands. However, the forests are a

# Spreading the Word

Forest Ministers Asking Opinion Leaders for a Helping Hand

Canada's forest ministers will take to the road over the next few months to bring the National Forest Awareness Campaign to the doorsteps of Canadian opinion leaders.

The ministers, members of the Canadian Council of Forest Ministers (CCFM), want to heighten the forest sector's profile, instill a sense of pride in the forest sector among Canadians, and develop an informed group of people who will take an active role in the campaign.

They plan to reach about 150 Canadian opinion leaders in the business, academic, political and media communities. Meetings will focus on the economic value and world

presence of Canada's forest sector and its products as a means of enlisting this group's support for the campaign. They will stress the forest sector's unmatched potential to contribute to Canada's future economic development.

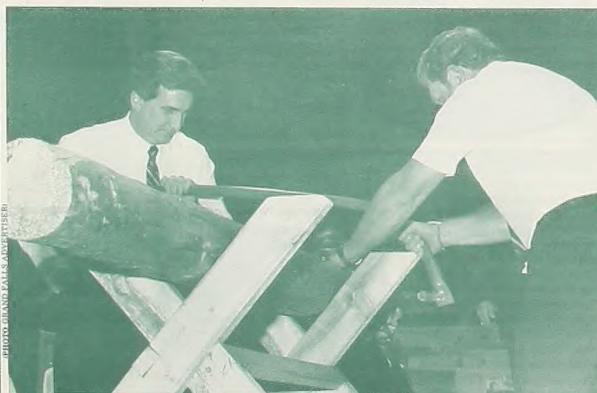
Canada being a trading nation, the ministers will highlight the forest industry's first-rate contribution to our balance of trade, emphasizing the severe challenges Canada faces from European tariffs and quotas that favour Scandinavian newsprint.

Finally, the ministers will stress that critical forest management and forest renewal decisions must be taken now and in the near future to ensure the long-term supply of wood and Canada's place as a world leader in forest products.

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TOGETHER...

Forestry Minister Len Simms of Newfoundland and Labrador, chairman of the Canadian Council of Forest Ministers (left), joins Mayor Paul Hennessey of Grand Falls, Nfld., in sawing a log to officially open the province's first forestry exposition. Mr. Simms took the opportunity to outline to Mr. Hennessey and other prominent Grand Falls citizens some of the plans for the National Forest Awareness Campaign.



DISCOVERING GREEN GOLD

Ottawa student Chantal Giroux, 11, is one of the first persons in Canada to play *Green Gold* on her school micro computer. The micro computer game is available from the Toronto-based company, School Services of Canada.

# Go for the Gold: Green Gold That Is



**T**ired of zapping space invaders? Come down to earth for a real challenge.

You're a logging truck dispatcher. Your job is to schedule the transportation of logs in a logging camp, from stump to dump, in the fastest, most efficient way possible. You're responsible for six landings and up to nine trucks.

The games were developed as an educational tool by the Canadian Forestry Service and Supply and Services Canada in cooperation with School Services of Canada.

But wait — you've dispatched too many trucks. Now you've got a problem. They can't all be unloaded at once so they're stacking up in line. Idle trucks and drivers are costing your company money. What should you do?

Try cutting back the number of trucks. But now you have too few. Logs are piling up and workers can't do their jobs. And now a truck has broken down. What do you do next?



The games were developed as an educational tool by the Canadian Forestry Service and Supply and Services Canada in cooperation with School Services of Canada.

Now, if you want to make some really big decisions, play *Integrated Resource Management*. As provincial premier, you decide how to use a block of land: for mining, forestry, wildlife reserves, or recreation — choices that often bring governments and forestry companies into conflict. Your decisions (as premier) are rated by the voters at the end of the game and your success or failure reflected on the ballot sheet. This fully interactive game promotes logical thinking and develops the problem-solving skills cherished by all current and aspiring politicians.

The games are intended for people from nine to 16 years old, but adults will also find them a real challenge.

All three games are available in both English and French and cost \$24.95 each. They can be ordered from: School Services of Canada, 66 Portland Street, Toronto, Ontario M5V 2M8; telephone (416) 366-9903.

For more information, contact School Services of Canada or the Information Officer at the nearest Canadian Forestry Service office.

(SEE LIST ON PAGE 6)

# Weed Tree to Become Wonder Tree in Alberta?

**A**spen has traditionally been considered to be a weed tree in Alberta. However, today a new aspen construction panel, known formally as oriented strandboard (OSB), is starting to make inroads into markets traditionally held by plywood and waferboard.

Until now, OSB has been certified by the Canadian Standards Association (CSA) for limited uses primarily in residential construction. Now the Alberta manufacturer of OSB, Pelican Spruce Mills Ltd., is working to expand the range of uses for which its product is CSA approved. To do this, a number of players have been brought into a contract funded by the Canada-Alberta Forest Resource Development Agreement.

The objective of the contract is to determine and demonstrate formally, the engineering properties of OSB. Once this is done, the CSA can set standards as to what the product can be used for. In turn, the Canada Mortgage and Housing Corporation will be able to approve mortgages for houses and other buildings incorporating OSB panels.

The testing of the OSB will involve measuring five properties relative to the strength of OSB panels in buildings. That's where the other project participants come in. The Alberta Research Council (ARC), Forintek Canada Corp. and the Council of Forest

Industries of British Columbia (COFI) will work together to put OSB samples to the test.

The ARC will conduct stiffness and flexure (bending) tests. Forintek will do shear testing (testing the strength of the bonds between panel layers). Forintek will also prepare samples for COFI, which will perform tension and compression tests. These combined tests will determine the panels load bearing capabilities.

The testing program is expected to be completed by the end of 1987. If all goes well, OSB is expected to have quite an impact in the construction materials market, and the demand for aspen will blossom significantly.



## DID YOU KNOW?

■ Of the approximately 800,000 hectares of forest that are harvested annually in Canada, only about 300,000 hectares regenerate naturally in a satisfactory manner.

■ In the early 1980's, about 200,000 hectares of forest land were being planted or seeded artificially, but much of the remaining 300,000 hectares were being added to the regeneration backlog. Federal-Provincial Forest Development Agreements, with a total funding of \$1.1 billion over 5 years, are now in place in every province and are contributing significantly to a reduction of the regeneration backlog.

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■ Canada is the world's leading exporter of forest products. In 1985, Canada's exports of forest products accounted for 22 per cent of the world total, for a total value of \$16.2 billion.

■ The forest industry is the top Canadian contributor to our balance of trade, ringing up a \$14.3 billion net trade surplus in 1985.

■ The forest sector contributes about \$33 billion to the Canadian economy in terms of the value of shipments of goods manufactured. In fact, forest products account for 14 per cent of all manufactured goods in Canada.

■ One in 15 Canadian workers are employed in the forest sector. More than 270,000 Canadians are directly employed in forestry and, when combined with indirect employment, the number of Canadians employed in the forest sector exceeds 750,000 individuals.

# Will Canada Stay Ahead of the Competition?

Canada's position as world leader in forest products is under attack.

Once undisputed, our position of leadership in the international trade of forest products is being challenged by changes in the world economy, new competitors, technologies and products. Developments such as a strengthened U.S. industry, new producers from South America, New Zealand and other regions, and Scandinavian competition in Europe have combined to raise concerns about Canada's future place in world forest products trade.

Forest products are Canada's largest single source of export earnings. Canada is the world's largest exporter of wood pulp, softwood lumber and newsprint. But 90 per cent of our forest product exports are concentrated in three markets: the United States, the European Economic Community (EEC) and Japan.



Canada is the only major trading nation that does not have guaranteed access to a market of a hundred million or more people. This makes Canada particularly vulnerable to the current trend of increasing protectionism in international trade and heightened concerns about our continued access to major forest product markets.

The United States is our biggest customer for forest products. It has provided us with the advantage of geographic proximity and, until recently, imposed little or no duty on major commodity products. Canada's main competitors in this market are the U.S. producers themselves, particularly those from the southeast.

Canada has benefitted from relatively free access to major markets to compete effectively. However, there are concerns about growing protectionist pressures in our traditional markets. The recent agreement negotiated

between the Government of Canada and the United States Department of Commerce has resulted in the imposition of a 15 per cent tax on the export of Canadian softwood lumber to U.S. markets. This is an example of the types of trade difficulties facing our industry at this time. An additional concern is relatively high tariffs on

higher value-added products. In addition, there is the disturbing prospect that non-tariff barriers will continue to offset the significant tariff reductions negotiated several years ago under the General Agreement on Tariffs and Trade (GATT).

In Europe, the Scandinavian countries offer the strongest competition. Their geographic proximity, duty-free access to the EEC market and exchange rate advantages have made it particularly hard for Canada to compete in this region.

#### PRODUCTION COSTS

A second factor bearing on Canada's competitive position is our ability to control production costs. Historically, Canadian forest producers have been high-cost, particularly in relation to our most important customers in the U.S. market.

#### PRODUCT MIX

Product mix is another area of concern. Our export trade is concentrated in commodity products with less added value, such as lumber, wood pulp and newsprint. Industry forecasts suggest that demand will increase at a faster rate for products with higher added value. This in turn suggests that we must continue to diversify our product mix in order to stay ahead of the competition in a changing market.

#### WORLD ECONOMIC CONDITIONS

Canada relies on stable economic conditions in the world economy. Factors like fluctuating exchange rates or high interest rates create uncertainty for traders and restrain trade.

Other factors that will affect Canada's future competitiveness include wood supply, production costs, product mix, world economic conditions, exchange rates, rapidly changing production technology and the requirement for substantial investment capital to update Canadian plants and equipment.

#### WOOD SUPPLY

There has been much discussion about the health of Canada's wood supply, but it seems likely that Canada's international competitiveness will not be significantly impaired by wood shortages, at least in this century.

Canada has extensive timber resources, and although much of the timber is in remote areas, Canadians have a lot of experience logging remote timber stands. However, the forests are to continue.

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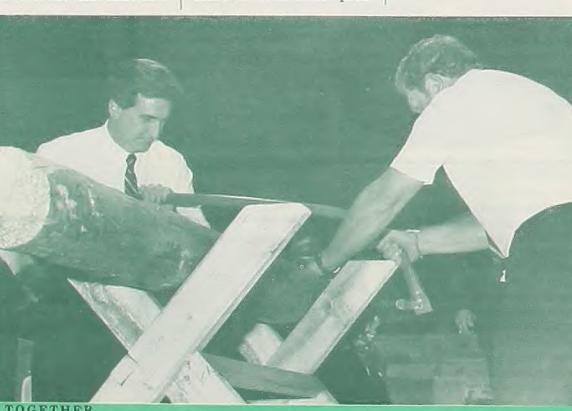
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Canada being a trading nation, the ministers will highlight the forest industry's first-rate contribution to our balance of trade, emphasizing the severe challenges Canada faces from new producers developing fast-growing tropical species.

The touring ministers will explain that this competition has cut into Canada's share of world forest prod-



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Fortunately, you can walk away from the problem, because it's only a game. You've been playing *Dispatcher*, one of a series of three video games collectively called *Operation Green Gold*. Now, if you want to make some really big decisions, play *Integrated Resource Management*. As provincial premier, you decide how to use a block of land: for mining, forestry, wildlife reserves, or recreation — choices that often bring governments and forestry companies into conflict. Your decisions (as premier) are rated by the voters at the end of the game and your success or failure reflected on the ballot sheet. This fully interactive game promotes logical thinking and develops the problem-solving skills cherished by all current and aspiring politicians.

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All *Operation Green Gold* games run on Apple II+, IIe and IIc personal computers, and will soon be available for the Commodore line.

But wait — you've dispatched too many trucks. Now you've got a problem. They can't all be unloaded at once so they're stacking up in line. Idle trucks and drivers are costing your company money. What should you do?

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Provincial Forest Development Agreements, with a total funding of \$1.1 billion over 5 years, are now in place in every province and are contributing significantly to a reduction of the regeneration backlog.

The area of productive forest receiving some form of intensive silvicultural treatment, such as site preparation, planting, weeding and thinning, has increased steadily since the early 1970's and had reached approximately 550,000 hectares by 1983.

Canada is the world's leading exporter of forest products. In 1985, Canada's exports of forest products accounted for 22 per cent of the world total, for a total value of \$16.2 billion. The forest industry is the top Canadian contributor to our balance of trade, ringing up a \$14.3 billion net trade surplus in 1985. The forest sector contributes about \$33 billion to the Canadian economy in terms of the value of shipments of goods manufactured. In fact, forest products account for 14 per cent of all manufactured goods in Canada.

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## Fire Wars

**C**anada is a world leader in fighting forest fires. We have to be. There are, on average, about 9,000 forest fires in Canada every year. They consume about 2 million hectares of forest land worth at least \$200 million in lost timber, real estate and recreational value. They cost more than \$200 million to put out.

Today, beating the high cost of fighting forest fires, while reducing fire damage, requires streamlined fire-fighting organizations using ultra-sophisticated technology. Such organization and technology are in place at the centralized fire-management centre of the Société de Conservation de l'Outaouais at Maniwaki, Québec.

A newly created technology transfer centre at Mani-

waki, started with funds from the Canada-Québec Resource Development Agreement, is rapidly earning an international reputation as a model of high-technology firefighting. The centre is mandated to transfer computerized forest fire-management techniques to other fire-protection regions in Québec. It is anticipated the centre will eventually serve the needs of fire-management agencies throughout Canada and the world.

For more information on the centre contact:  
Société de Conservation de l'Outaouais  
Aéroport de Maniwaki  
C.P. 50  
Maniwaki (Québec)  
J9E 3B3

A newly created technology transfer centre at Mani-

## Gala Kick-Off for Campaign

**G**reen Gold/L'or vert, "the national forest awareness campaign," will be launched January 26, 1987, in Montreal, with a gala sound-and-light show for representatives of the forest sector and members of the business, labour, academic and arts communities.

The official kick-off to the \$4-million, two-year campaign to make Canadians more aware of their forest sector, coincides with the Annual Convention of the Canadian Pulp and Paper Association. More than 5,000 delegates will be in Montreal, and more than 2,000 people are expected to attend the campaign kick-off. The

January 26 ceremonies will be videotaped and available for future viewing.

The guests will view the series of four 30-second television commercials in English and French that will first be aired on January 18, 1987, and spearhead the first phase of the campaign over the coming months. They will also hear about the print campaign, a series of four advertisements that will begin running in magazines across the country in January. Following the program, the guests will have an opportunity to meet with the members of the Canadian Council of Forest Ministers and discuss the campaign.

## Want to Know More?

**I**f this edition of *Forestry Forum* has just whetted your appetite for more information on Canada's forest sector, just ask. We are preparing a series of four booklets on research, technology, new markets and forest management that are yours for the asking.

You can learn about the latest research in forest products by companies like Forintek, Foric, Papicran, by Canadian universities, by the pulp and paper industry, and by the Canadian Forestry Service (CFS). Learn about new developments in silviculture. Find out how Canadian-developed waferboard has revolutionized the industry, and how bio-engineering applied to Canada's forests is

producing tomorrow's crop of "super trees."

Perhaps you're interested in the technological side of forestry. Journey into the forest where mechanical harvesters have revolutionized logging, and to Canada's waterways, where giant ships dump several thousand tons loads of logs at the push of a button. However, you'll also learn that Canada — the country that engineered the world renowned CL-215 water bomber — still imports most of its forest-related technology from foreign manufacturers.

Explore new markets for Canada's forest products. Asia and the Pacific Rim, where skyrocketing economic growth rates, represent the

fastest growing market for Canada after the United States. Find out what we're doing to market wood pulp and newsprint to China.

How about forest management? Learn how integrated resource management uses improved silviculture techniques, like replanting and thinning, combined with technology, like artificial intelligence computers, Landsat satellites and lighting counters, to protect and improve the yield of Canada's forests.

To obtain any or all of these booklets, or for more information on Canada's forests, contact the Information Officer at the nearest federal or provincial office listed below.

### MINISTRY OF NATURAL RESOURCES

MINISTÈRE DES RICHESSES NATURELLES  
Whitney Block, Room 5340  
99 Wellesley Street West  
Toronto, Ontario  
M7A 1W3

### MANITOBA DEPARTMENT OF NATURAL RESOURCES

MINISTÈRE DES  
RESSOURCES NATURELLES  
DU MANITOBA  
Forestry Branch  
800-530 Kenaston Blvd.  
Winnipeg, Manitoba  
R3N 1Z4

### SASKATCHEWAN PARKS & RENEWABLE RESOURCES

MINISTÈRE DES PARCS ET DES RÉSOURCES  
RENOUVELABLES DE LA SASKATCHEWAN  
Forestry Division  
P.O. Box 3003  
Prince Albert, Saskatchewan  
S6V 6G1

### DEPARTMENT OF FORESTRY, LANDS AND WILDLIFE

Alberta Forest Service  
10th Floor  
Bramalea Building  
9920-108th Street  
Edmonton, Alberta  
T5K 2M4

### MINISTRY OF FORESTS & LANDS

MINISTÈRE DES TERRES ET FORETS  
Attention: Public Affairs  
Parliament Buildings  
Victoria, British Columbia  
V8W 3E7

### DEPARTMENT OF RENEWABLE RESOURCES

MINISTÈRE DES RÉSOURCES  
RENOUVELABLES  
Government of the Northwest Territories  
P.O. Box 1320  
Yellowknife,  
Northwest Territories  
X1A 2L9

### DEPARTMENT OF NATURAL RESOURCES & ENERGY

MINISTÈRE DES  
RESSOURCES NATURELLES  
ET DE L'ÉNERGIE  
Communications Branch  
P.O. Box 6000  
Fredericton, New Brunswick  
E3B 5H1

### MINISTÈRE DE L'ÉNERGIE

### ET DES RÉSOURCES

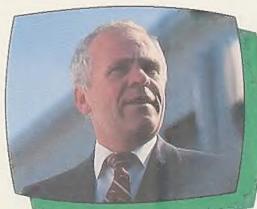
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7<sup>e</sup> étage  
Québec (Québec)  
G1R 4X7



# Putting the Canadian Forest Sector on the map!



# Now a major TV and Magazine Campaign.



International Personality: Pedro Ramirez Vasquez

"This cathedral is made from the most magnificent Canadian wood. In Mexico, we still believe in using traditional materials. Right now, your wood products are among the world's best. Just make sure you stay ahead."

Hajime Tsuboi

"This is a typical kind of house that we Japanese have lived in for hundreds of years. Today we are building more and more Western-style homes like this one. We use your Canadian wood, and we also import your technology. Remember, you are world leaders in the forest industry."

Colleen McCullough

"The Thornbirds was a success in Canada. It earned some dollars for Australia and even one or two for me. Mind you, most of my books are printed on Canadian paper, and that earns a lot of dollars for you.

I know how important your forest products are. I also know the kind of reputation they enjoy. Just make sure you stay ahead of the competition."

Sir John Egan

"Jaguar is a good example of technology that gives us in Britain an edge in world competition. In Canada, your forests give you a marvelous edge. The basic resource is renewable and there's endless technological development in the areas of paper and wood products. World markets are growing, but competition is growing faster. Just make sure you stay ahead."

**ADVERTISING SCHEDULE**

**Canadians deserve to know! Help spread the word about Canada's richest resource and biggest business – YOUR forest sector.**

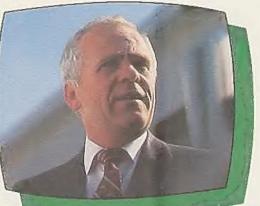
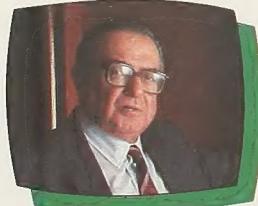
This is a large black and white advertisement for Canadian forests. The top half features a historical illustration of a printing press with the text "Si Gutenberg savait...". The bottom half features a map of Canada with various forest scenes and international trade icons. The central text reads "Le Canada, une adresse internationale".

# La parole est au secteur forestier canadien!



## Conseil canadien des ministres des forêts

## Une campagne d'envergure dans les médias électroniques et imprimés



Personnalité  
internationale

Pedro Ramirez Vasquez

“Le plafond de la basilique est entièrement lambrissé de splendide bois canadien.  
Au Mexique, nous continuons à utiliser les matériaux de construction traditionnels.  
Vos produits du bois comptent actuellement parmi les meilleurs au monde.  
Conservez votre avance.”

Hajime Tsuboi

“Au Japon, la maison traditionnelle n'a guère changé depuis des siècles. Cependant, les maisons de style canadien, comme celle-ci, s'avèrent de plus en plus populaires. Nous importons votre bois et nous adoptons même vos techniques de construction. Le Canada est un chef de file qui ne doit pas se laisser devancer.”

Colleen McCullough

"Mon roman a connu un vif succès au Canada. Il a garni les coffres de l'Australie et m'a donné une certaine aisance. La plupart de mes livres sont imprimés sur du papier canadien et ça, c'est à vous que ça profite. L'industrie forestière joue un rôle vital dans votre pays. Il faut donc garder votre avance sur vos concurrents."

Sir John Egan

«Les innovations technologiques de Jaguar nous donnent un avantage à l'échelle internationale. Au Canada, ce sont vos forêts qui vous procurent cet avantage. Elles sont renouvelables et donnent lieu à un développement technologique illimité dans l'exploitation du bois et la production du papier. La demande mondiale augmente et la concurrence devient plus vive. Ne vous laissez pas devancer.»

#### DATES DE DIFFUSION NATIONALE

À LA TÉLÉVISION  
RÉSEAU NATIONAL  
DANS LES REVUES

**Personne ne sait mieux que VOUS l'importance de la forêt canadienne et sa contribution à notre économie. Parlez-en à vos amis dès aujourd'hui!**

*Vous vouliez en savour plus?* Le super-arbre, la biogénétique, le CD-215 . . .

A black and white photograph of a B-52 bomber flying through a dark, turbulent sky. The aircraft is shown from a low angle, with its wings and engines visible against the dark background. A large, bright, jagged hole in the clouds ahead of the plane creates a dramatic visual effect, suggesting a recent explosion or a hole in the sky. The overall mood is somber and dramatic.









